UNITING OUR MEMBERS AND THE NATION

Empowering leaders, educating students, strengthening communities

Retirees 4 Public Education: An Organizing Program to Engage NEA Retirees in the Strategic Priorities of the Association

Matt Kruse—Arizona Education Association Organizational Consultant and Membership Coordinator
NEA Leadership Competency Addressed in this Session—Organizing

- Level 1: Foundational, Level 2: Mobilizing & Power Building and Level 2: Agenda Driving

- The Following NEA Leadership Themes are Addressed
  - Utilizes organizing best practices
  - Makes strategic plans that rely on data
  - Engages in collective action to identify & address pivotal issues
  - Creates conditions for continuous association growth & strength
  - Fosters the development of leaders at all levels of the organization
NEA Strategic Goal and NEA Organizational Priority Addressed in this Session

• NEA Strategic Goal
  — Strategic Goal 1: Strong Affiliates for Educator Voice and Empowerment

• NEA Organizational Priority
  — Early Career Educators
Your Presenters

- Todd Crenshaw: Organizational Specialist NEA C4O & Coordinator of the NEA Retired Program

- Julie Horwin: President of the AEA Retired Association

- Leah Knaeble: President of the Paradise Valley Education Association

- Matt Kruse—AEA Organizational Consultant & State Membership Coordinator
Session Purpose and Outcomes

• Provide Participants with information about the AEA-Retired Project model.

• Identify Key Success Factors to Consider in Replication Efforts in Participants State or Local Associations.

• Provide Participants Time and a Format to Draft a Replication Plan
NEA-Retired Project Overview

• The Arizona Education Association could not have taken part in the retiree project without the resources and support of the NEA Retired Program

• Todd Crenshaw at the NEA level and Julie Horwin at the AEA level were instrumental in bringing this project to Arizona

• How did they make this happen?
• Partnership with AEA-Retired and local associations to assist in building visits with one-on-ones of members and potential members.

• Building local campaigns with the questions defined by the local and the focus on building the capacity, membership and power of the local.
The Goals

• Membership growth of at least 200 new members
• New leader identification at sites
• Issue organizing and/or learning the issues at the site that can be organized around
• Train Retirees to assist our locals and site leaders with how to have the one-on-ones and make a membership ask
• Identification of recent retiree leaders (last 5-7 years) who become AEA Retired members
Financial Support from NEA

- $30,000 already received; NEA has pledged an additional $20,000 for this work this school year = $50,000 total
- Each region gets 90 “paid” people at $110 per day
  - $110 payment x 90 people (Retired member or Site Leader) = $9,900 per region x 4 regions = $39,600
  - $10,400 available to support payment to retirees for training session, training and materials/supplies used in locals, and possibly a HQ Region blitz
$110 for Release Time

• Hearing it is difficult for our members to do one-on-ones due to busy school day schedules, this project will pay for release time for local leaders to be committed to a full-day of conversations at their school site.

• AEA will pay the member directly if they use a personal leave day, or will reimburse the school district at a max of $110 for a substitute for the day.

• Retirees will also receive the $110 per day.

• Contracts for each local association campaign will be drafted and need to be signed by all who expect payment from AEA (+W9 forms).
State Association Requirements

• Any recently retired person recruited by the local for this project, must be an AEA- Retired member.
• The AEA-Retired member must agree to attending training and following the project plan as outlined by the local association.
• Every potential member will receive a membership ask.
  – AEA-Retired has recruited 30 interested retirees through an application process. This pool of retirees can be utilized to supplement needs for local site visits.
Local Association Requirements

- Work with OCs to identify targeted school sites and provide school names and dates.
- Recruit recently retired members from the local or region (goal of those who retired within the last 5-7 years).
- Determine how many retirees will be needed from the AEA-Retired pool so retirees can be identified for those specific dates/school sites.
- Develop local campaign:
  - What are the questions that will be asked of members and potential members? (Develop intake form)
  - What is the local goal around number of conversations held, membership recruitment goal, and number of leaders identified?
  - Local follow up after plan for after the site visit
Local Association Requirements cont.

• Get approved building access from district/school admin (must be able to go in on prep time and not just be confined to a single location)

• Obtain the school building employee list and prep periods as well as a school building map

• Ask field associate to do breakdown of member and potential member at each targeted site so data is ready

• Confirm what site leader/local leaders will be “working” each site visit with the retirees

• Provide a separate training to train the local leaders and local-identified retirees
AEA Staff Requirements

• Submit local association, dates and targeted school sites
• Submit number of retirees needed from AEA-Retired (+ specific dates and school sites)
• Completed W9 and contract for each member and retiree who is to be paid
• After site visit, submit the tracking sheet provided by AEA—totals of number of one-on-ones with member/potential member breakdown (+ new educators), new leaders identified, and new members recruited (this will allow us to track data across all these projects)
Need to Know Locals and Dates ASAP

• Region A:
  – Tucson – site visits Oct. - May
  – Casa Grande Elementary and Union HS – site visits Jan.-May

• Region B:
  – Tempe Elementary – Oct. 23-27
  – Kyrene EA - Nov. 6-9
  – Tempe Secondary EA (spring semester)

• Region C:
  – Creighton EA - Oct. 30-Nov. 10
  – Phoenix Elementary (cert and ESP)
  – Phoenix Union CTA & CEA (joint site visits)
  – Buckeye Elementary

• Region D:
  – Paradise Valley EA – Nov. and Jan. - May
  – Cottonwood Oak-Creek EA
  – Flagstaff EA – spring semester
  – Washington DEA
## Some Fall 2017 Results

<table>
<thead>
<tr>
<th>Tempe Elementary EA</th>
<th>Tucson EA</th>
<th>Paradise Valley EA</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Seven sites in two days</td>
<td>• Two sites in two days</td>
<td>• 5 sites in 7 days</td>
</tr>
<tr>
<td>• 53 members contacted</td>
<td>• 13 members contacted</td>
<td>• 99 members contacted</td>
</tr>
<tr>
<td>• 205 potential members contacted</td>
<td>• 34 members contacted</td>
<td>• 126 potential members contacted</td>
</tr>
<tr>
<td>• 13 new educators contacted</td>
<td>• 7 new educators contacted</td>
<td>• 52 new educators contacted</td>
</tr>
<tr>
<td>• 14 potential leaders identified by retiree team</td>
<td>• 14 potential leaders identified by retiree team</td>
<td>• 40 potential leaders identified by retiree team</td>
</tr>
<tr>
<td>• 23 new members</td>
<td>• 5 new members</td>
<td>• 21 new members</td>
</tr>
</tbody>
</table>
## Membership Blitz vs. Listening Tours

<table>
<thead>
<tr>
<th>Membership Blitz Characteristics</th>
<th>Listening Tour Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Emphasis is on contacting and recruiting all potential members.</td>
<td>• Emphasis is on contacting and listening to all potential and current members.</td>
</tr>
<tr>
<td>• Sites selected because of low membership market share.</td>
<td>• Sites selected for strategic reasons which might include low market share.</td>
</tr>
<tr>
<td>• Follow up strategies are not considered in original planning.</td>
<td>• Follow up strategies are part of selection and commitment of target sites.</td>
</tr>
</tbody>
</table>
Key Success Factor # 1: Determine Your Non-Negotiables

Commit to the State, Local and Staff Requirements. All three stakeholders might want to bend the rules. They exist to optimize effort and impact.

For example: “Can we just place the retirees in our local without site leader involvement?

“Can I participate without being an AEA-Retired Member?

“Can I request 10 retirees to assist and turn in the dates and sites later?

What requirements/non-negotiables will set you up for success?

Please use the provided template to capture your initial thoughts.
Key Success Factor #2: Assessment of Local Association

<table>
<thead>
<tr>
<th>Site</th>
<th>Members</th>
<th>Potential Members</th>
<th>% Market Share</th>
<th>Contact Cards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aire Libre (2)</td>
<td>27</td>
<td>10</td>
<td>73%</td>
<td>2</td>
</tr>
<tr>
<td>Echo Mtn. Intermediate (2)</td>
<td>16</td>
<td>13</td>
<td>55%</td>
<td>3</td>
</tr>
<tr>
<td>Arrowhead (2)</td>
<td>22</td>
<td>16</td>
<td>58%</td>
<td>3</td>
</tr>
<tr>
<td>Boulder Creek (1)</td>
<td>16</td>
<td>26</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Fireside (2)</td>
<td>23</td>
<td>27</td>
<td>46%</td>
<td></td>
</tr>
<tr>
<td>Campo Bello (1)</td>
<td>16</td>
<td>21</td>
<td>43%</td>
<td>2</td>
</tr>
<tr>
<td>North Ranch (1)</td>
<td>21</td>
<td>19</td>
<td>53%</td>
<td>2</td>
</tr>
<tr>
<td>Eagle Ridge (3)</td>
<td>29</td>
<td>9</td>
<td>76%</td>
<td>4</td>
</tr>
<tr>
<td>Hidden Hills (2)</td>
<td>17</td>
<td>17</td>
<td>50%</td>
<td>2</td>
</tr>
<tr>
<td>Desert Cove (2)</td>
<td>27</td>
<td>17</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Quail Run (2)</td>
<td>31</td>
<td>10</td>
<td>75%</td>
<td>3</td>
</tr>
<tr>
<td>Cactus View (2)</td>
<td>26</td>
<td>19</td>
<td>58%</td>
<td>5</td>
</tr>
</tbody>
</table>
### PVEA Target Sites for Fall 2017

<table>
<thead>
<tr>
<th>Tier One</th>
<th>Tier Two</th>
<th>Tier Three</th>
</tr>
</thead>
<tbody>
<tr>
<td>Palomino Primary</td>
<td>Desert Trails</td>
<td>Vista Verde</td>
</tr>
<tr>
<td>Paradise Valley High School</td>
<td>Whispering Wind</td>
<td>Boulder Creek</td>
</tr>
<tr>
<td>North Canyon High School</td>
<td>Pinnacle Peak Prep</td>
<td>Palomino Intermediate</td>
</tr>
<tr>
<td>Shea Middle School</td>
<td>Shadow Mtn. High School</td>
<td>Campo Bello</td>
</tr>
<tr>
<td>Desert Shadows Elementary</td>
<td>Mtn. Trail Middle School</td>
<td>Fireside</td>
</tr>
</tbody>
</table>
Key Success Factor # 2: Assessment Considerations

• What is the capacity of the local and/or sites that are selected?

• Is there an issue with access? If so we strongly encourage you to select another local or site. What is acceptable access in your world?

• What strategic approach will give your local/state the best bang for your buck?

What assessment criteria will set you up for success?

Please use the provided template to capture your initial thoughts.
Key Success Factor # 3: Planning

Fail to Plan, Plan to Fail

- Determine goals that are local centric and fit the project parameters. Freedom with Fences.
- Consider prioritizing your targets. Early Educator Example
Key Success Factor # 3: Planning

• Determine questions that are local centric that will be used at the sites.

1. What is the single biggest change or additions that would improve the learning environment in your classroom or job assignment?
2. Amongst your colleagues at this school, who do you consider to be a leader?
3. What is your perspective of the St. Patrick Day Education Association?
4. What issue or issues would you like SPDEA to focus on?
Key Success Factor # 3: Planning

• Training Retirees—The more info you can supply them about the district, the local and the site, the better they like it.
• Examples: District demographics, local demographics and site market share, Pre-Visit Survey by Site Leaders, President reflections on administration.
• Site Leader Training—Clear expectations regarding pre-visit and day of visit responsibilities. Refer to Local Responsibility Slide

What goals and targets will set you up for success?
What questions would be most beneficial for your situation?

Please use the provided template to capture your initial thoughts
Key Success Factor # 4: Site Visit Preparation

• Prepare and then be ready to monitor and adjust. (Handout PVEA Checklist)

Best Practices

1. Communication with Principal & Staff.
2. Request certified prep times & site maps. Master List.
3. Plan for absences and staff without a prep.
4. Personalize packets by target group. Use NEA contact cards.

What site visit preparation will set you up for success?

Please use the provided template to capture your initial thoughts
Key Success Factor # 5: Follow Up Planning

What is the biggest change that would improve the job assignment/learning environment?

- Supplies/Resources: 15%
- Technology: 13%
- Student behavior: 12%
- Class size: 12%
- Morale: 10%
- Too much work/not enough time: 7%
- Curriculum/Education Support: 6%
- Need classroom aides/paras: 6%
- Need Better Salary: 4%
- Need admin support/no micromanaging: 8%
- Covered parking: 1%
- Insurance Benefits: 3%
- Need custodians: 3%
Follow-Up Planning

Who is a leader at your school?

- Katrina Dieck, AP: 14%
- Felicia Favela: 21%
- Kim Jones: 17%
- Scott Lawrence, Principal: 7%
- Lindsey Bielicki: 5%
- Patti Fortin: 2%
- NVAA Teachers: 2%
- Traci DeGraw: 2%
- Jenny: 2%
- Scott Russell: 3%
- Lindsey: 2%
- Patti Fortin: 2%
- NVAA Teachers: 2%
- Angie Mitchell: 5%
- PE Teachers: 2%
- Scott Russell: 3%
- Jenny: 2%
- Lindsey Bielicki: 5%
- Keli Fitzekam: 2%
- Math Chair: 2%
- ARC Team: 3%
- Kate Hammond: 2%
- Todd Swigart: 2%
- Lead Psych: 2%
Follow Up Planning

What issue(s) should PVEA focus on?

- Salary/Benefits: 29%
- Class size: 12%
- School funding: 3%
- Separating from AEA/NEA: 2%
- Micromanaging Admin: 2%
- Equity: 8%
- Focus on data/testing (too much): 5%
- Focus on data/testing: 3%
- Social/Economic Justice: 2%
- Maternity Benefits: 3%
- Stipends for 504s: 2%
- Make sure teachers are happy: 2%
- More political involvement: 2%
- More paras/better pay for ESP: 2%
- Lack/Loss of instructional time: 2%
- FT Librarians at Every Site: 2%
- Resources: 2%
- Better PD: 2%
- Improving ELL Services: 6%
- Collaboration with teacher colleges: 2%
- Study Sync Support: 2%
- Mentoring of new teachers: 2%
Follow Up Planning

Three Opportunities to Optimize the Project

• Membership Plan—Potential members from initial visit that we should touch base with. NEA Early Enrollment eligible?
• Leadership Plan—Who was identified by colleagues and/or retirees? How do we engage these potential leaders?
• Issue Organizing Plan—What issues emerged that we can use in an organizing effort at this work site?
• Increase site leader capacity by the integration and alignment of the three plans with appropriate support and assistance from the local and staff.
Follow Up Planning

What follow up plans will set you up for success and optimize your efforts?

Please use the provided template to capture your initial thoughts.
Session Outcomes

The content from this session can be used in the following ways in your current position/role:

– Informing key stakeholders in your state or local about the potential of using NEA retirees to further the priorities of the association
– Utilizing organizing best practices
– Making strategic plans that rely on data
– Engaging in collective action to identify & address pivotal issues
– Creating conditions for continuous association growth & strength
– Fostering the development of leaders at all levels of the organization
– **Replicating the AEA Retiree Project in your local association.**
Thank You for Participating

• Please complete the evaluation for this breakout session by using the **NEA Summit Mobile APP**!

• Please visit the Leadership Development Resources website at [www.nea.org/leadershipdevelopment](http://www.nea.org/leadershipdevelopment)

• Please let us know if you have additional questions.